

**Chapter 1 Concepts**

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**OVERVIEW**

This section addresses the entire solicitation process. This process is divided into four categories: preparation, amending, recording bids and awarding the solicitation. Preparation includes creating the solicitation header, attaching requisition(s), establishing characteristics, etc. Amending includes creating an amendment document, amendment text, revising bid opening, etc. Recording bids includes bid opening, recording bids, processing bid tabulations, etc. Award includes setting award flag(s) and solicitation status code change.

**Solicitation  
Header Table**

The purposes of the solicitation header table are:

- To provide a transaction for recording a solicitation requirement in AGPS and titling the requirement
- To provide a process whereby the conditions of a bid may be established, i.e., bid opening date, etc.
- To provide identification of required conferences
- To provide identification of required certification
- To provide identification of price sheet header format(s) to be used for solicitation price sheets
- To establish vendor selection criteria for bid list generation
- To provide a process whereby the solicitation may be posted to the web via LaPAC.

The solicitation header table is used to establish and maintain all information required for processing of a solicitation within AGPS.

**Solicitation  
Requisition  
Table**

The purposes of the solicitation requisition table are:

- To provide a transaction for attaching requisition(s) in desired order (sequence) of processing to a solicitation
- To provide a transaction for viewing requisitions attached to a solicitation

The solicitation requisition table is used to attach requisition(s) to a solicitation. This same table is also used for update of the requisition record with the solicitation number of the solicitation the requisition was attached to.

**Solicitation  
Line Table**

The purposes of the solicitation line table are:

- To provide a relationship between solicitation lines and attached requisition lines
- To provide a reference point to be used by batch programs for processing award of solicitation lines

The solicitation line table is used to establish and maintain the relationship between solicitation lines and all requisition lines of requisitions that have been attached to the solicitation.

**Solicitation  
Text Reference  
Table**

The purposes of the solicitation text reference table are:

- To provide the capability to identify text references from the Text Database to be used for processing/print of special terms and conditions and additional specifications of a solicitation
- To provide a reference point for change of special terms and conditions and additional specifications of a solicitation
- To provide a reference point for print of special terms and conditions and additional specifications of a solicitation

This table is used to identify all text references of special terms and conditions and additional specifications for a solicitation, if they are authorized for print of that solicitation and to provide a reference point for retrieval and change of text reference.

**Solicitation  
Attachment  
Text Table**

The purposes of the solicitation attachment text table are:

- To provide a transaction for creating and maintaining attachment text (additional instructions, etc.) for solicitation processing/print
- To provide a single reference point for print of attachment text for print of a solicitation

The solicitation attachment text table is used to create and maintain text, i.e., additional processing instructions, documentation requirements, etc., that will be printed as an attachment to a solicitation document.

**Solicitation****Vendor Table**

The purposes of the solicitation vendor table are:

- To provide a transaction for adding and maintaining bidding vendors for a solicitation
- To provide a transaction for recording vendor bid data for a solicitation
- To provide a reference point for print of vendor copies of a solicitation

The solicitation vendor table is used to add and maintain solicitation bidding vendor record(s) for a solicitation. This same data is used for determining those vendors to be issued a copy of solicitation when printed (issued).

**Solicitation****Amendment  
Table**

The purposes of the solicitation amendment table are:

- To provide a transaction for creating and maintaining solicitation amendment(s)
- To provide a transaction for revising the solicitation bid opening date and time
- To provide a transaction for identification of vendors authorized to receive an amendment and a reference point for print of vendor copies of a solicitation amendment

The solicitation amendment table is used to add and maintain solicitation amendment(s), revise bid opening date and time for a solicitation and select vendors to receive a copy of a solicitation amendment.

**Solicitation****Amendment Text  
Table**

The purposes of the solicitation amendment text table are:

- To provide a transaction for creating and maintaining solicitation amendment(s) text
- To provide a reference point for print programs for print of solicitation amendment text

The solicitation amendment text table is used to create and maintain solicitation amendment(s) text for a solicitation amendment.

#### **Requisition**

##### **Vendor Table**

The purposes of the requisition vendor table are:

- To provide a transaction for recording and maintaining vendor bids at the solicitation/requisition line level
- To provide a record of condition of the vendor bid at the solicitation/requisition line level
- To provide a means to identify the vendor bid to be awarded for a solicitation/requisition line

The requisition vendor table is used to record the vendor's response and condition of that response at the solicitation/requisition line level.

## Terminology

The following terms are used throughout this section:

**Alternate Bid.** This term is used to refer to a code used to identify a bid at line level as an alternate bid (bid that varies from the solicitation terms).

**Amendment Number.** This term is used to refer to the solicitation amendment record, it refers to the number of an amendment to the solicitation record.

**Amendment Type Code.** This term is used to refer to a code used to define the type of amendment being processed for a solicitation.

**Award Code.** This term is used to refer to a code used to define the required purchase processing of a solicitation document.

**Bid Evaluation Type.** This term is used to refer to a code used to define the type of bid evaluation to be used for solicitation processing of a solicitation line.

**Bid Tabulation Type.** This term is used to refer to a code used to define the type of bid tabulation to be used for solicitation processing of a solicitation line.

**Buyer Code.** This term is used to refer to a code assigned to a purchasing agent. This code is then assigned to a solicitation to identify the person responsible for purchase processing of a solicitation document.

**Cause Code.** This term is used to refer to a code used in the solicitation record to define reason for failure to comply with the solicitation schedule as listed in the solicitation header and displayed on the SDO3 screen.

**Certificate Type.** This term is used to refer to a code that defines the type of certification required for bid of a solicitation or performance of a resulting award of a solicitation.

**Conference Code.** This term is used to refer to a code that defines the type of conference required for processing of a solicitation.

**Cooperative Procurement.** This term is used to define a purchase action that may be used to fulfill the requirements of other than state agencies.

**Degree of Difficulty.** This term is used to refer to a code used to identify the complexity of a solicitation and adjust the scheduled dates of a solicitation.

**Document Type.** This term is used to refer to a code assigned to a solicitation that defines the purpose of the solicitation document.

**FOB Point.** This term is used to refer to a statement (Freight On Board) defining the point at which delivery is considered performed. E.G., Destination, Vendors Warehouse Dock, etc.

**GEO Bid Code.** This term is used to refer to a code that is used to define a geographical area for performance of an award issued as a result of a bid.

**Line Number.** This term is used to refer to two different transactions. If referring to the solicitation record, it refers to the line number of the solicitation line. If referring to the requisition record, it refers to the requisition line record.

**Master Bid Return Code.** This term is used to refer to a code used to define the condition of a vendor's bid at the solicitation level.

**Nature of Purchase.** This term is used to refer to a code used to define the nature of purchase of a solicitation document, i.e., routine, complex, difficult.

**Notice To Bidders.** This term is used to refer to a printed notice of availability of a solicitation, and is mailed to a vendor on a bid list instead of a solicitation.

**LaPAC Post.** This term is used to define an action that would place a copy of a solicitation and amendment to the web via the LaPAC system.

**Price Sheet Style.** This term is used to refer to a code used to define the style of price sheet to be used for solicitation processing of a solicitation line.

**Purchasing Agency.** This term is used to refer to an agency identified as being responsible for the purchase action of this solicitation.

**Solicitation Code.** This term is used to refer to a code used to define the required solicitation processing of a solicitation document.

**Solicitation Number.** This term is used to refer to a unique number assigned to a solicitation document for processing and tracking within AGPS.

**Source Code.** This term is used to refer to a code used to define the source of a solicitation bidding vendor record.

**Return Code.** This term is used to refer to a code used to define the condition of a vendor's bid at the line level.

**T-Number.** This term is used to refer to a code used for identifying type of or contract group for a contract award action.

## **Key Concepts**

### **Overview**

A solicitation is another of the key fundamental components of the purchasing process. Solicitation processing is that part of AGPS where the purchasing agency requests the vendors to submit an offer for the supplies or services. The data entered previously on the requisition is used in the solicitation and ultimately the contract or order. The solicitation identifies and describes the supplies or services to be purchased and when and where they are to be delivered. The purchasing agency uses the information recorded during solicitation processing to award the contract or issue the order for the supplies or services.

### **Solicitation Components**

The solicitation process is divided into four major components: preparing solicitations, amending solicitations, recording bids, and awarding orders or contracts to vendors. Preparing solicitations includes creating the solicitation header, attaching requisitions, and establishing characteristics such as certifications, conferences, and vendor selection criteria. Amending solicitations includes creating an amendment document that includes changes to the solicitation such as the bid opening date. Recording bids includes opening, recording, and tabulating bids. Awarding contracts includes setting award flags and changing the solicitation status codes.

### **Types of Solicitations**

There are two basic types of solicitations defined as document types which determine the process to be used to accomplish the purchase. Formal solicitations require submittal of sealed bids and public bid openings. Informal solicitations also require submittal of sealed bids but may not require a public bid opening as in the case of an invitation to bid. The solicitation code combined with award code and requisition document type will determine the process for award. Awards may be for non-contract items resulting in open market purchase orders. Awards may also result in contracts for recurring purchases.

### **Solicitation Amendments**

These documents are used to change solicitation specifications or terms and conditions in a minor way. If there is a major change to the solicitation, it should be cancelled and reissued. The most common amendment is to change the date of a bid opening, either by itself or in conjunction with other changes. Amendments are distributed to all vendors who received a copy of the solicitation unless they have been eliminated by the purchasing agency for some reason.

### **Recording of Bids**

A bid can only be recorded if the bidder is in the AGPS vendor database and is associated with the solicitation. Bid return codes are used to describe the condition of bids and how they should be handled. For example, a non-responsive bid is one that does not respond to the essential requirements of the solicitation and will not be considered for award. AGPS will handle primary and alternate bids, if authorized and submitted.



## **SOLICITATION PROCESSING**

## **CONCEPTS**

### **Key Concepts**

Contract Award	AGPS automatically produces a printed tabulation of the bids. Inconsistencies such as wrong quantity bid will be highlighted by AGPS. Optionally, AGPS will propose awards that can be accepted or overridden by the buyer. A solicitation can be awarded to a single vendor or multiple vendors based on criteria established in the solicitation.
Solicitation Approvals	As a solicitation is created in AGPS, approvals are automatically created from predetermined approver tables. Additional approvals may be manually added to the process. All approvals must be obtained or cancelled in order that the solicitation can proceed to the next step in the purchasing process.
Solicitation Status	The solicitation status code tells AGPS when to perform a task. The buyer sets the status code in order for AGPS to process the solicitation to the next step. When status codes are changed, AGPS creates a history record for each of the status code changes to show the solicitation number, status code, USERID making the change, and date and time the change was made.
On-Line Solicitation Build	The on-line solicitation build process is performed by RQS2. This is a process that is initiated by a status code change to 265 on RQS2. This process will build the required solicitation header record, attach the requisition building the required SRQN record, update requisition status code to indicate attached to a solicitation and sets the solicitation status to 307 indicating it is system generated. If the user has identified a recommended vendor on RQS5, required SVEN (Solicitation Vendor) records are also created. The solicitation is ready for immediate recording of bids by a status code change on SDOC to 365.
Management	The solicitation process provides excellent management tools to determine the status and history of each purchase. The process also facilitates buyer assignment and workload management, and milestone and exception reporting.

**Discussion of  
Transactions****Solicitation  
Header Table  
(SDOC/SDO2/  
SDO3/SDO4/  
SDO5/SDO6)**

The solicitation header transaction(s) is used to initially add the solicitation header and maintain solicitation data. SDO2 is used for specifying additional classes/subclasses, geographic bid codes, identification of bond requirements, etc. SDO3 is for scheduling. SDO4 is for conference requirements. SDO5 is for certification requirements. SDO6 is for price sheet header processing. All information required for processing of a solicitation is contained within the header record.

**Solicitation  
Line Table  
(SLIN)**

The solicitation line is established and maintained by the system for establishing a solicitation/requisition line relationship. This table must exist for processing of bids against a solicitation.

**Solicitation  
Requisition  
Table (SRQN)**

The solicitation requisition transaction is used to attach requisition(s) to a solicitation. This same table is then used for building the SLIN table for subsequent processing of RVEN records.

**Solicitation  
Text Reference  
Table (STXT)**

This transaction is used to identify all text references that may be used as special terms and conditions or specifications for a solicitation, if they are authorized for print of that solicitation and to provide a reference point for retrieval and change of text reference. The text reference must be in this table to be changed by the solicitation text line changes transaction (STXL).

**Solicitation  
Attachment Text  
Table (SATT)**

The solicitation attachment text transaction is used to create and maintain text, i.e., additional processing instructions, documentation requirements, etc., that will be printed as an attachment to a solicitation document. Text in this record will print only on the solicitation.

Solicitation  
Vendor Table  
(SVEN/SVE2/  
SVE3)

The solicitation vendor table transaction(s) is to used to add and maintain solicitation bidding vendor record(s) for a solicitation. This same record is subsequently used for recording vendor bid response data, bond data and conference attendance at the solicitation level.

Solicitation  
Amendment  
Table (SAMD)

The solicitation amendment table transaction is used to add and maintain solicitation amendment(s), revise bid opening date and time for a solicitation and select vendors to receive a copy of a solicitation amendment. This transaction also identifies the type of amendment action processed for that solicitation.

Solicitation  
Amendment Text  
Table (SATX)

The solicitation amendment text table transaction is used to create and maintain solicitation amendment(s) text for a solicitation amendment.

Requisition  
Vendor Table  
(RVE2)

The requisition vendor table transaction is used to record the vendor's response and condition of that response at the solicitation/requisition line level. Additionally, this transaction is also used to indicate award of the solicitation/requisition line.